Email Management Decision Tree*

- **Is the email a NON-RECORD?**
  - **YES**: Non-records are drafts, notes, and preliminary computations; duplicates, unsolicited notices or invitations, routing slips and envelopes, personal materials (materials of the university employee that have no relation to his/her duties as an officer of the institution).
  - **DELETE**

- **Is the email TRANSITORY?**
  - **YES**: Transitory communication is email that is directly connected to the transaction of public business conducted by university employees, but has a short-term business value.
  - **DELETE after reference need ends**

- **Is the email ROUTINE?**
  - **YES**: Routine communication comprises emails that occur between university employees, and external stakeholders as they work together to transact public business on behalf of the University of Regina.
  - **DELETE 6 months after business activity or project is completed**

- **Is the email a UNIVERSITY RECORD?**
  - **YES**: Communication which demonstrates a university transaction or a university action has retention applied based on the content and its relation to business functions, activities, transactions.
  - Includes emails that document the formulation and execution of basic policies and decisions and the taking of necessary actions; facilitate action by business unit officials and their successors; document important meetings (whether internal or external); protect the financial, legal, and other rights of the University and of persons directly affected by the University’s actions.
  - **1 - Classify based on records schedule**
  - **2 - Retain based on records schedule**
  - **3 - Delete based on records schedule**

*Inspired by the University of Wisconsin – Madison Employee Guide to: Electronic Communication Guidance for University Records

- **Approximately 75% of email will be NON-RECORDS or TRANSITORY**
- **Approximately 15% of email will be ROUTINE**
- **Approximately 10% or less will be UNIVERSITY RECORDS**

- **These emails have no business value after the information contained in the message has been conveyed or superseded, or the event/transaction/activity to which the message is related has occurred;**
- **These emails do not establish policies, guidelines, or procedures, certify a transaction, become a receipt, perpetuate or formalize business activities of the University of Regina;**
- **These emails are not necessary for statutory, legal, or fiscal purposes; these emails have no historical value;**
- **These emails would not be filed in a records management system**